



ScaleFluidly

Overview and Key Capabilities

ScaleFluidly is a modular, API-first platform designed to standardize and scale complex commercial processes across pricing, quoting, and approval workflows. It is positioned as an operational layer that works alongside existing systems, including CPQ, CRM, contract lifecycle management, and order management, enabling organizations to centralize logic without replacing core transactional platforms. The platform primarily focuses on managing pricing complexity and orchestrating deal workflows. It supports advanced pricing scenarios including contract-based pricing, discounting, price waterfalls, and customer-specific entitlements. These capabilities are combined with structured workflow management, including approval routing, exception handling, and decision traceability, allowing organizations to control how deals progress through internal processes. ScaleFluidly also connects processes across the broader quote-to-cash lifecycle, supporting contract integration and multi-channel workflows across direct, partner, and eCommerce environments. The platform supports high-volume, multi-line quoting and is designed to handle large rule sets with performance optimizations. The platform also includes basic product configuration capabilities using rule-based logic to guide selections and validate combinations. Its modular structure includes components such as QuoteCX for quote creation, PriceCX for pricing logic, AdminCX for governance and workflow configuration, and OrderCX for order transition processes. In addition, Athena is introduced as an embedded AI assistant that provides contextual insights into deal status, approvals, and next steps within workflows. The platform supports integration with Salesforce, HubSpot, SAP, and contract platforms, and includes ISO 27001 certification and SOC 2 Type II compliance. It also emphasizes low-code/no-code configuration to enable ongoing system changes.

Benefits

ScaleFluidly provides a structured approach to managing complex commercial processes by centralizing pricing logic and workflow orchestration. This can help reduce fragmentation across systems while improving consistency and control over pricing and approval-driven deal decisions. The platform's workflow capabilities enable organizations to define and enforce approval processes, including exception handling and routing based on predefined conditions. This supports improved

transparency and traceability across sales, finance, and legal functions, allowing teams to better understand deal status and approval history. By integrating with existing enterprise systems, the platform enables organizations to extend current environments rather than replace them, which can reduce disruption to established processes. The low-code/no-code approach allows business users to manage catalogs, pricing rules, and workflows with less reliance on technical resources. In addition, embedded functionality such as the Athena assistant provides contextual visibility into ongoing deals, supporting users with insights into approvals, risks, and next steps within active workflows.

Considerations

ScaleFluidly is still developing parts of its product and ecosystem, which may be relevant for organizations evaluating long-term scalability and deployment models. The current implementation approach relies primarily on internal resources, as a broader system integrator and partner ecosystem is still being established. Some aspects of the user experience suggest that certain workflows, such as product configuration and quote creation, may require multiple steps, indicating potential opportunities for refinement in usability and process efficiency. Product configuration capabilities are based on a rule-driven approach and are best suited for structured scenarios rather than highly complex configuration environments. In addition, current AI capabilities appear to be focused on specific use cases such as workflow visibility and localization, with broader functionality still evolving. Organizations with requirements for advanced AI-driven selling or automation capabilities may need to assess roadmap alignment. These factors suggest that the platform continues to evolve in terms of depth, usability, and ecosystem support.

Summary

ScaleFluidly is positioned as a platform focused on managing pricing complexity and coordinating deal workflows across the quote-to-cash lifecycle. Its approach centers on acting as an operational layer that integrates with existing enterprise systems, allowing organizations to centralize pricing logic, approval processes, and workflow orchestration without replacing core platforms. The platform combines pricing, quoting, and approval-driven workflow management within a modular architecture that supports integration across CRM, ERP, contract, and order systems. Its capabilities are aligned with environments where pricing structures, contract entitlements, and approval processes introduce operational complexity at scale. Product configuration is supported at a foundational level, complementing the platform's primary focus on pricing and workflow orchestration. ScaleFluidly also extends beyond traditional quoting use cases by supporting broader commercial workflows, including coordination across sales, finance, and legal teams. The addition of an embedded AI assistant indicates a direction toward improving visibility and contextual understanding within active deal processes. At the same time, the platform reflects characteristics of a developing solution, with certain areas such as ecosystem expansion, user experience, and advanced feature depth still evolving. Overall, ScaleFluidly can be understood as an emerging platform focused on improving control, consistency, and scalability in complex pricing and workflow environments, with an emphasis on integration and operational standardization.